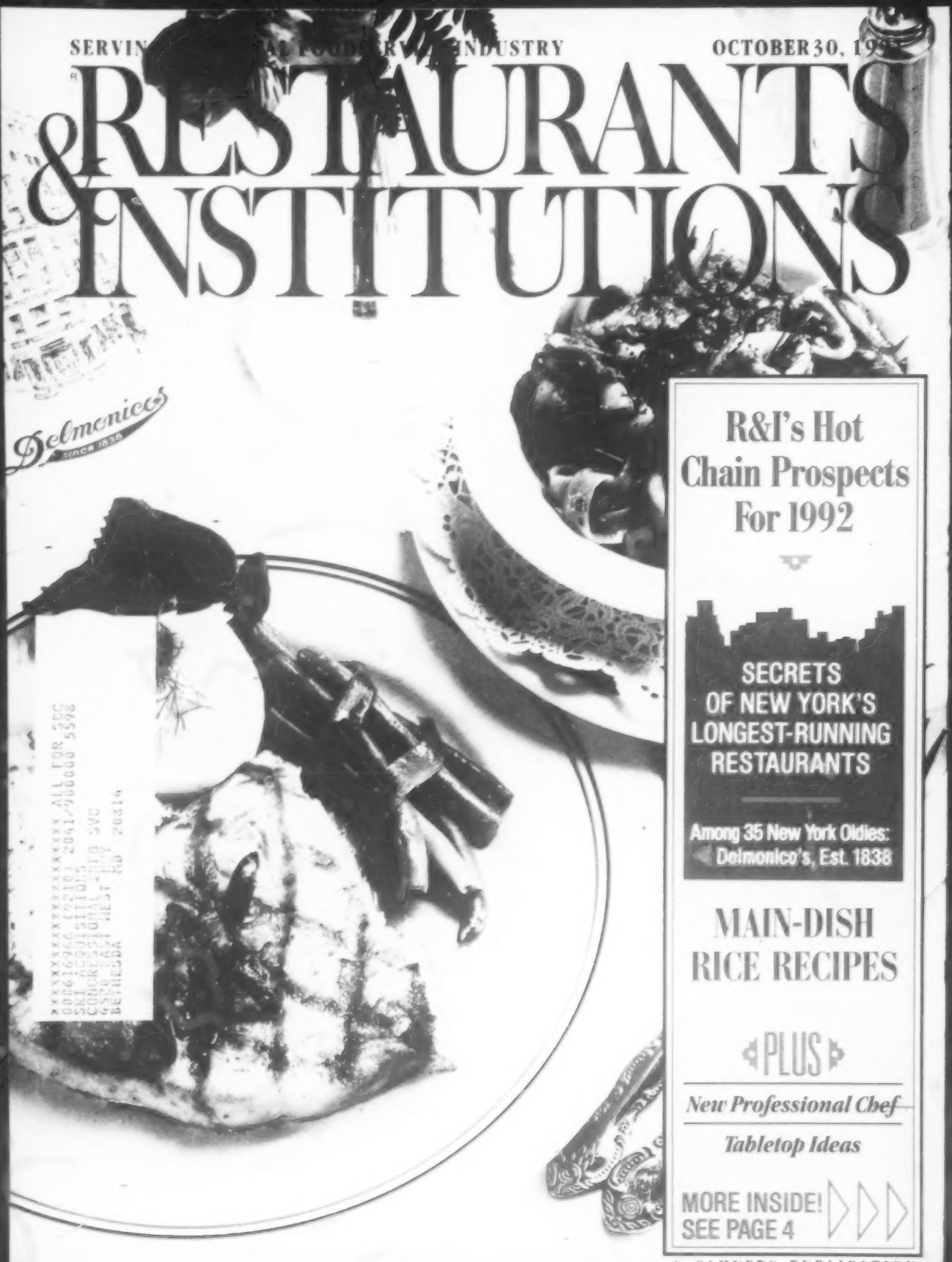
SERVIN[illegible] FOODSERVICE INDUSTRY

OCTOBER 30, 19[illegible]

RESTAURANTS & INSTITUTIONS



R&I's Hot Chain Prospects For 1992

SECRETS OF NEW YORK'S LONGEST-RUNNING RESTAURANTS

Among 35 New York Oldies: Delmonico's, Est. 1838

MAIN-DISH RICE RECIPES

PLUS

New Professional Chef

Tabletop Ideas

MORE INSIDE! SEE PAGE 4

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OCT. 30, 1991

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Chains take aim at fastest-growing niches: casual dining, Italian, Oriental delivery.

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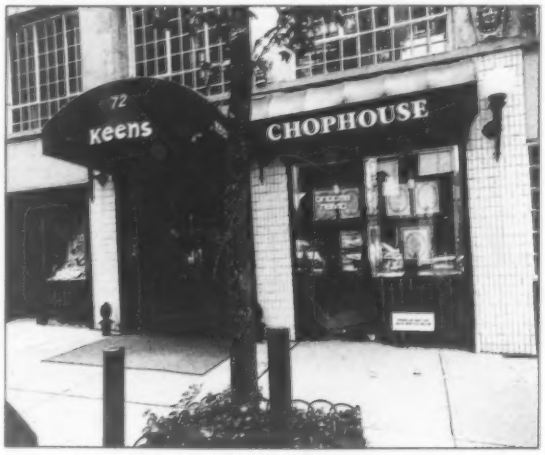


TASTE: New York's Keens Chop House thrives at age 106 . . . 68

38 R&I EXCLUSIVE: NEW CHAINS TO WATCH IN 1992

R&I's 1991 Hot Prospect concepts cover the map of hot menu niches: from Portland, Ore., where Macheezmo Mouse is moving its "Fresh—Fit—Fast" Mexican food, to Sayreville, N.J., where Roli Boli is rolling out made-to-order, calzone-type sandwiches. Most have found a product or service—skinless chicken, Oriental delivery, healthful options—to appeal to customers the established fast-food chains aren't reaching. Our profiles include menu descriptions, growth strategies and franchise information.

68 NEW YORK CITY'S VENERABLE EMPORIUMS OF VICTUALS

It's remarkable in this day and age that there are 35 restaurants in New York City that are more than 50 years old. Fraunces Tavern served our founding fathers, and P.J. Clarke's has dispensed drink and stews since 1890. Delmonico's has pampered celebrities, including Diamond Jim Brady, Lillian Russell and Mark Twain, since the turn of the century. Is there a secret to their long lives? Traditional food, value, history, ambience or location? Taste offers some clues. (On the cover: Swordfish steak niçoise, pasta calamari and other seafood dishes amiably share menu space with the steak that made Delmonico's a legend.)

89 TABLETOP TRENDS: FASHION PLATES AND BIG, BIG BOWLS

Out-of-the-ordinary dinnerware is on the table for discussion. Oversize plates and deep bowls for pasta and salads add style to tabletops, while angular-shaped and black plates provide a stage for dramatic desserts and eye-catching entrees.

96 RICE IS ESPECIALLY NICE IN ENTREES

More rice dishes are showing up among entree offerings. And thanks to the growing availability of domestic rices that can be substituted for higher-priced imported aromatics, these entrees are likely to carry ethnic flavors. Our food feature offers recipes for hearty rice dishes, including Greek Rice and Rice Enchiladas.

HOTEL INDUSTRY EXPECTED TO REBOUND BY '93

The overbuilt hotel industry will begin pulling out of its nose dive by 1993, according to forecasts by New York-based accounting firm Coopers & Lybrand.

The company makes the predictions in the first volume of its new quarterly lodging journal, *Hospitality Directions*, which paints a sobering picture of the industry.

Over the last several years, growth in the supply of hotel rooms has exceeded demand, which has put pressure on both occupancy and room rates.

While room rates have lagged behind inflation, interest costs have soared, as debt from the build-and-buy binge of the last decade has piled up.

WIDESPREAD LOSSES

The cost of servicing and restructuring debt coupled with low occupancy rates and an inability to raise room prices is fueling widespread losses. Sixty percent of hotels posted net losses in 1990.

The near-term outlook for the industry also is generally poor: Both business travel and the economy continue to be soft; lodging demand tends to trail improvements in the overall economy by two to six months; and the number of delinquent hotel loans and foreclosures continues to climb.

Almost 20% of hotels are at extreme risk of failure, having occupancy rates below 50%. A disproportionate number of them are units of upper-midscale chains.

So many hotels already have failed that the U.S. government now numbers among the largest owners of hotels in the country. The Resolution Trust Corp., which the federal government established in 1989 to dispose of the assets of failed savings and loan companies, has more than 150 hotels in its portfolio.

On the plus side, healthy hotel companies might find bargains among foreclosed hotels. Management companies might benefit from contracts to operate hotels that lenders have taken back. And lower-end chains are benefiting from the repositioning of failing hotels that switch brands.

SLOWED EXPANSION

The poor profit picture for hotels and the depressed values of real estate have scared off lenders and put the brakes on construction of new properties.

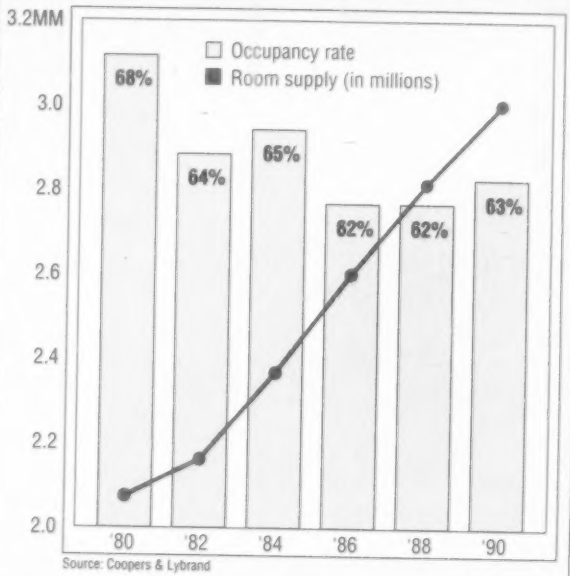
Although the slowdown has forced painful cuts for many companies, it is seen as necessary if the industry is to improve.

Coopers & Lybrand estimates hotel completions will decline to 26,600 rooms in 1993 from 104,400 in 1990. Some lenders also might begin to demolish failed hotels for their land, which should help the industry in the long run.

The accounting firm predicts a rebound in demand and a slowdown in supply growth will boost the occupancy rate to 64% in 1993 from 61% in 1991. This will give operators the flexibility to accelerate room rate increases and thereby improve profits.

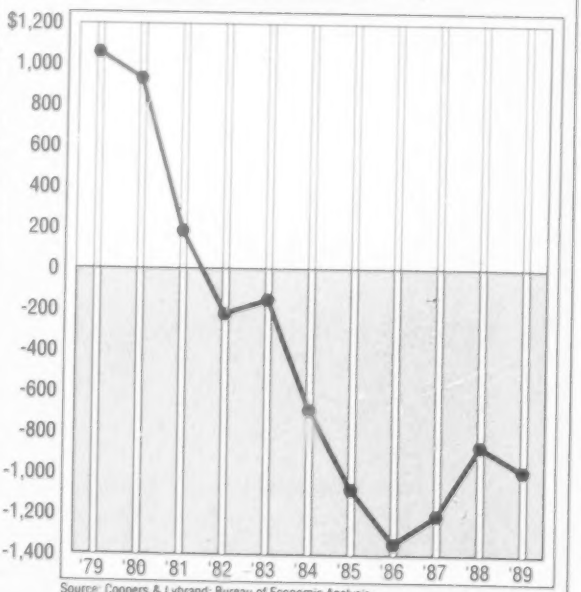
—Rajan Chaudhry

ROOM SUPPLY OUTSTRIPS DEMAND
(seasonally adjusted occupancy rate vs. no. of hotel rooms)



Source: Coopers & Lybrand

HOTELS POST EIGHT STRAIGHT YEARS OF LOSSES
(annual profit per available room)



Source: Coopers & Lybrand; Bureau of Economic Analysis

R&I EXCLUSIVE

These 28 chains take aim at the fastest-growing niches, from casual dining and Italian to skinless chicken and Oriental delivery.

In good times, you can afford to take a flier on the long shot, the sentimental favorite. When money is scarce and the stakes are high, you go looking for a sure thing.

That's the pattern *R&I* found in compiling this year's list of Hot Prospects, chains with extra-good sales or growth potential. Certain menu concepts well-represented on past lists—for example, fast-food hamburgers, sweets or the standard fried chicken—had almost no contenders this year. Instead, many candidates targeted not segments, but menu *niches*, finding a product to appeal to customers not being served by the majors.

Most of these niches have long been identified as areas rich in promise, if only someone could do them right. The competitive times being what they are, it seems more worthwhile than ever to unlock the secret of Oriental delivery or devise a "healthy" format.

Sales figures in the following descriptions are for calendar 1990 unless noted, but unit figures include all stores currently open. *AUV* stands for same-store average unit sales volume. Check average is per-person and all-day, unless otherwise noted. —*The Editors*

La Salsa draws a discerning crowd with its gourmet burritos and soft tacos al carbon.

1991 UP-AND-COMERS

BLESS YOUR HEART
BOSTON BEANERY & TAVERN
BUFFALO WILD WINGS AND WECK
CHARLEY'S STEAKERY
CHICKEN A-PEEL
CHOPSTIX
FAZOLI'S
GREEN BURRITO
HARVEST RESTAURANT & BAKERY
HOUSE-CHOW
HOBEE'S RESTAURANTS
HOMESTYLE BUFFET
HUDSON'S GRILL
JASON'S DELI
JILLIAN'S BILLIARD CLUB & CAFE
JUICY LUCY'S
LA SALSA
MACHEESMO MOUSE
MICHEL'S BAKERY & CAFE
ROLI BOLI
STUFF 'N TURKEY

TESTS AND SPINOFFS

CANTINA DEL RIO
HARDWOOD GRILL
KRYSTAL KWIK
LOVE'S BAR & GRILL
PIZZA KING EXPRESS
RAGAZZI'S —A PLACE FOR PASTA
VITA BELLA

GROWTH CHAINS

continued from page 39

The hottest Mexican chains are marketing themselves as the healthy alternative.

SECOND CONCEPTS GET A SECOND LOOK

Several well-established concepts have identified growth opportunities outside their core markets and now are running test units outside their original lines of business.

The parent company of Golden Corral, Raleigh, N.C., is testing Ragazzi's—A Place for Pasta, its 175-seat entry to the casual Italian dining segment. Located in Jacksonville, S.C., the unit features a menu with standards such as veal Parmesan, manicotti, spaghetti and other pasta dishes. With an average per-person check of $8 to $10, the concept targets middle-income families.

Meanwhile, Columbus, Ohio-based Bob Evans Restaurants will add a Tex-Mex accent, Cantina del Rio, to its 256-unit family-dining chain. Scheduled to open in spring 1992, the 300-seat test might offer items as ambitious as marinated quail and shrimp with jalapeño and cheese, along with the more conventional fajitas. The company expects the unit to see $3 million to $4 million in sales, compared to an AUV of $1.4 million for the typical Bob Evans restaurant.

MEXICAN

HAUTE MEXICAN CHAIN

La Salsa, Los Angeles

Sales, $12 million; units, 22; AUV, $550,000; check average, $5.50.

The La Salsa menu reads, "We don't own a can opener." The phrase epitomizes the 22-unit chain's reputation for serving fresh and authentic Mexican fast food. Restaurant-guide guru Tim Zagat calls La Salsa's fare "Mexican fast food at its very best."

The 16-year-old chain has what owner Howdy Kabrins describes as a cult following in upscale neighborhoods of southern California. Customers favor its soft tacos al carbon, gourmet burritos, skinless chicken and a lavish mild-to-hot salsa bar. Some dine as often as five times a week to eat healthful favorites such as the California burrito, which is filled with black beans, avocado, cheese and a touch of fresh salsa.

Kabrins also doesn't own a "franchises for sale" sign. He says he doesn't have to because potential franchisees are constantly calling him. Their wait might be over—the company is stepping up its growth plans. Six new units, in such areas as Scottsdale, Ariz.; Denver; and Santa Barbara, Calif., will open by early 1992. Shortly thereafter, plans call for selling six-unit territories in the Midwest and New England. The franchise fee is approximately $30,000. The royalty is 5% and the advertising fee is 2%.

THE MOUSE THAT ROARS

Macheezmo Mouse, Portland, Ore.

Sales (fy end 7/2), $7 million; units, 12; AUV, $600,000; check average, $5.55.

Flying the banner "Fresh—Fit—Fast," Macheezmo Mouse is yet another fast-food Mexican chain looking to capitalize on the new breed of diners demanding convenience and healthful food.

Two-thirds of the menu—served to order, usually within four minutes—meets nutrition guidelines for major health organizations, including the American Heart Association. The Mouse posts calorie counts and percentages of calories from fat on its menu.

Menu favorites include a line of burritos made with flour or whole-wheat tortillas. The chicken, vegetarian or Santa Fe-style burritos are stuffed with brown rice, black beans and Monterey Jack cheese. They are topped with "Boss" sauce, salsa and mixed greens. Also popular are the chicken and vegetarian salads, along with the "Famouse #5" vegetarian plate, which consists of brown rice, black beans, Jack cheese, salsa and cilantro.

The 10-year-old chain will add only one unit in 1992 (to open next spring), because management wants to be cautious during what President William Warren considers unstable economic times. However, plans call for four new units in 1993 and 10 to 14 units between 1994 and 1995. The chain will fill in its existing markets in the Northwest and look for focused expansion eastward.

ONE FILLING BURRITO

Green Burrito, Santa Ana, Calif.

Sales, $22.5 million; units, 43; AUV, $500,000; check average, $5.

The Green Burrito fits neatly into the new price/value consumer mind-set. The menu attracts southern Californians who are tired of typical fast-food fare and unwilling to frequent expensive, full-service Mexican restaurants.

Green Burrito does such a good job at filling its niche in the Mexican market that its owners expect it to grow to 60 units from 43 by year's end. Nine of the new units will be company owned. Chief Executive Officer Gary McArthur expects more than 100 franchises to be open by the end of 1992. Long term, McArthur expects to fill in the chain's strong southern California market with 150 to 200 stores. The company also is working on a deal in Saudi Arabia, where a foreign investor wants to build 20 units.

The signature item on the menu is the Big Ed Burrito, weighing more than two pounds and priced at $2.95. A breakfast menu includes huevos rancheros, house-made chorizo, and egg burritos.

Sales for year ended 12/31/90 unless a different fiscal year (fy) is noted. average unit volume (AUV) is for units open at least one year.

CASUAL DINING

MEALS AND WHEELS

Hudson's Grill, Ventura, Calif.

Sales, $17.8 million; units, 15; AUV, $1.3 million; check average, $7.25.

If your basic comfort-food diner is on one side of the road, and your typical casual restaurant is on the other, then auto-themed Hudson's Grill cruises right down the center white line. The '50s is the decade of choice at Hudson's—but it's the '50s of classic cars and classy streamlined decor, not of quilted-aluminum diners.

And while nostalgia is on the menu, particularly in the burgers and fountain drinks, it makes room for the '90s in the form of sandwiches, salads, appetizers and light entrees. A new 60-item menu rolled out in September has 17 chicken dishes, including spicy Indonesian chicken salad ($5.45), a barbecued chicken breast sandwich ($5.65), and chicken tacos ($5.50).

The chain's parent, American Restaurants, began as a Wendy's franchisee, but recently renamed itself Hudson's Grills of America after selling off its last Wendy's units. HGA quickly announced its first franchise pact outside of California: a deal for 15 units in five years in Texas. Growth beyond the West Coast is expected.

WHERE EVERYBODY KNOWS YOUR MENU

Boston Beanery Restaurant and Tavern, Morgantown, W.Va.

Sales, $3.3 million; units, 4; AUV, $820,000; check average, $12.50.

Tapping both an interest in the neighborhood dining/gathering place and audience affection for TV's "Cheers," Boston Beanery has grown slowly over seven years as founder Mike Forte fine-tuned the menu and design package. But the chain's expansion hopes shift into high gear this year, when it will add six units—two in Virginia, two in Morgantown, and one each in Greenville, S.C., and Uniontown, Pa. Two more units are in the works for next year, and the company hopes to open up to 20 new franchised units in the next five years.

Intentionally simple, the Beanery menu relies on standards: 10 oversized deli sandwiches such as the Reuben and steak and cheese ($2.79 to $4.99), and 14 grilled or broiled chicken and steak sandwiches ($4.49 to $5.79). Also popular is the signature Boston Beanwich, a grilled sandwich of bacon, Cheddar cheese and, yes, baked beans, on whole-wheat bread. Dinner entrees, available after 5 p.m., include broiled swordfish ($10.99) and New York strip steak ($12.99).

Full-service bars also contribute heavily to the bottom line, since the chain targets small-to-medium markets with a customer base of university students and young professionals. The presence of a second profit center means that future Beaneries can occupy floor space ranging anywhere from 2,500 to 4,500 square feet, according to Administrative Vice President Steven Jones, and can be tailored to fit a number of sites—office, strip mall or free-standing. The franchise fee is $20,000; monthly royalties are 5.5%.

ITALIAN

ROOM TO ROME

Fazoli's, Bowling Green, Ky.

Sales, $4 million; units, 14; AUV, $720,000; check average, $3.50.

One hundred twenty restaurants by 1995. That's the goal of Fazoli's President and CEO Kuni Toyoda, and with backing from Osaka, Japan-based conglomerate Duskin Co. Ltd., he's off to a fast start.

Toyoda and Duskin created the Seed Restaurant Group last year to purchase the fledgling Fazoli's fast-food Italian chain from Lexington, Ky.-based Jerrico, which owns the Long John Silver's chain of quick-service seafood shops.

Since the purchase in May 1990, Toyoda has continued to refine the concept. He dropped most of the chain's sub sandwiches because of low demand, while adding items like baked ziti and pasta salad. Among the chain's lowest-priced entrees are pizza at $1.29 a slice and spaghetti with tomato sauce for $1.89. The most popular menu item is a Sampler Platter, consisting of lasagna, fettuccine Alfredo, and spaghetti with meat sauce, for $3.69, he says. Lasagna, at $3.59, is another favorite.

The majority of Fazoli units are clustered in Lexington, Ky., and Orlando, Fla. Beginning this month, Fazoli's plans to begin converting eight Rax units in Indianapolis, a move that should swell the chain to 20 units by the end of 1991, says Toyoda. Another eight to 10 units are on the drawing board for 1992. Thus far, all units but

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Oversized desserts are part of the appeal at Hudson's Grill, but so are more unique offerings such as spicy Indonesian chicken salad and grilled mahi-mahi on a sesame bun.

GROWTH CHAINS

Unique Italian fast-food concepts offer new niche for chain operators.

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one are company owned; Toyoda says about a third of the system ultimately will be franchised.

Toyoda estimates the cost of building and opening a new Fazoli's at $420,00 to $450,000. Conversions cost considerably less: $150,000 to $250,000. Franchise agreements call for royalties of 4% of sales and advertising contributions totaling 5%.

BOLI SCORECARD: STRIKE!
Roli Boli, Sayreville, N.J.
Sales, $1.5 million; units, 11; AUV, $400,000 to $600,000; check average, $5 to $6.

Tony Felicetta, founder and president of Roli Boli Enterprises, says the inspiration for his unique product—the Boli—came from Italian calzones and stromboli sandwiches. "I always liked them, but they were too doughy and heavy," he says.

Like calzones, Bolis are rolled, closed sandwiches filled with a variety of ingredients. What makes them different is their lighter, French bread crust.

In true niche-marketing fashion, Felicetta has set out to parlay his Bolis into a mall-based chain of restaurants that caters to the health- and calorie-conscious.

For $3.50 to $5.50, customers can choose from a selection of Bolis on the menu or custom design their own from an array of fresh ingredients at the "Boli Bar." In either case, the Boli is made to order in front of them and cooked in a small conveyer over, dubbed the "Bolitron." The whole process takes about 3 minutes.

Felicetta says that among the most popular standard Bolis is the 317-calorie Veggie Boli, which combines spinach, mushrooms, onions, olives, peppers and mozzarella. It contains less than 6 grams of fat.

Felicetta, who began franchising last year, already has eight franchises open and expects to open one to three more units in 1991. He currently has commitments for 26 new stores, he says. His plans call for developing the East and West coasts first, and then moving inward.

According to Felicetta, the cost of opening a Roli Boli unit runs between $100,000 and $180,000. Food and paper costs average 25% to 26% of sales; labor ranges from 23% to 26%. He charges a $20,000 franchise fee and collects royalties of 5% of sales. Franchisees are obligated to spend 2% of sales on marketing, but to increase awareness of his product, Felicetta encourages them to use the money for sampling.

Fazoli's fast-food Italian concept has strong financial backing, experienced management and consumer dining trends in its favor.

SANDWICHES

COLUMBUS DISCOVERS PHILLY
Charley's Steakery, Columbus, Ohio
Sales, $1.8 million; units, 5; AUV, $350,000; check average, $4.75.

In 1990, Charley's Steakery's version of a Philadelphia cheese steak sandwich, called the Grand Steak (regular, $2.69; large, $4.69), was voted the best in Columbus by *Pigging Out Columbus*, food and management consultant Carl Japikse's guide to the "111 best restaurants" in Ohio. The chain was founded in 1986 by Charley Shin, then a 22-year-old junior at Ohio State University.

Shin began to offer franchises last August, requiring $15,000 licensing fees, 4% royalties and 1% advertising fees. The price, he says, is well below that of competitors, and is part of the attraction for the concept.

The restaurants offer grilled sirloin steak, chicken, ham and turkey topped with a variety of vegetables and cheeses prepared in front of customers. Hand-cut fries cooked in peanut oil (regular size, 99 cents; large, $1.29; jumbo, $2.49) and freshly squeezed lemonade (99 cents) highlight the menu. Shin hopes to have 300 units open within five years. Five are scheduled by March of 1992.

THE LURE OF CAFE SOCIETY
Michel's Bakery & Cafe, Oak Brook, Ill.
Sales, $1.1 million; units, 3; AUV, $350,000 to $500,000; check average, $4.50.

Michel's Bakery & Cafe is the result of an evolution. "The customer in the food court is not an impulse buyer," says Michael Simpson, president and CEO. "The day of a single-item store in mall food courts is on the way out." Instead, he says, customers—and mall developers—are looking for variety from a single location.

For that reason, breakfast and lunch croissant sandwiches ($3.39 to $3.69), croissant pizzas ($2.39 to $2.69), soups and an upscale salad bar (23 cents an

continued on page 50

Sales for year ended 12/31/90 unless a different fiscal year (fy) is noted; average unit volume (AUV) is for units open at least one year.

GROWTH CHAINS

Sandwich chains pair offerings with soup or salad to make a winning combination.

SPECIALTY CHAINS GET CASUAL

With its broad menus and equally broad demographics, the casual-dining segment has attracted several chains now known for other concepts.

Consolidated Products, Indianapolis, parent of the 117-unit Steak 'n Shake chain and several specialty restaurants, has opened the first in a concept it calls Hardwood Grill. Fare at the 180-seat Indianapolis test unit ranges from barbecued ribs, fajitas and wood-grilled fish to gourmet pizzas, hand-cut french fries and desserts baked in-store. Plans are to convert other Consolidated restaurants to Hardwood Grills before building new stores.

Love's Barbecue, Laguna Hills, Calif., is now testing Love's Bar & Grill in Huntington Beach, Calif. The pilot supplements Love's ribs menu with pizza, pasta, chili, broiled fish, lamb chops, a full bar and an extensive appetizer menu suitable for grazing. At $11 per person, the average check is comparable to Love's conventional stores. But the company expects sales volume to be higher—between $1.6 million and $2 million, compared to $1.2 million at Love's Barbecue.

continued from page 44

ounce) are part of Michel's menu, complementing the cookies and baked goods. The menu provides a mix of full meals and snacks to attract all-day business, according to Simpson.

The chain's parent company, Cookie Factory of America, which operated The Cookie Factory and The Cookie Factory Bakery (30 units total), developed into Americookie Inc. to comprise the chain's newest and driving concept. Some of the Cookie Factory Bakeries might be converted to Michel's, according to Simpson.

Growth will come through franchising, according to Simpson, with fees of $25,000, a 5% royalty and a 0.5% advertising fee. The total start-up cost is about $180,000, only one-third of that in cash or equity.

THE BEST LITTLE DELI IN DALLAS

Jason's Deli, Beaumont, Texas

Sales, $15 million; units, 20; AUV, $1.2 million; check average, $5.

When one thinks Texas, one thinks barbecue. But the proprietors of Jason's Deli are getting Texans to think corned beef on rye and turkey and pastrami on an onion roll. "We're a modified New York deli," says Steve Simmons, vice president of franchising. "We've got a few things on the menu you won't find in any traditional New York deli." A New Orleans muffuletta ($8.50, serves two people) and the Deli Cowboy ($4.95), smoked beef brisket topped with longhorn Cheddar, onions and barbecue sauce, are two examples of Southern influence on the menu.

The chain, with units in many major Texas cities and a few in Arizona, plans to open at least two more units by the end of the year and has only begun actively franchising in the last year. Sights are set for development in the South, from the Atlantic to Arizona.

ORIENTAL

WOK 'N' ROLL: CHINESE DELIVERS

Ho-Lee-Chow, Ann Arbor, Mich.

Units, 3 (none open more than a year).

The "last fast-food frontier" is how Tom Burnham, president of HLC America, describes Chinese delivery. The former executive vice president of Domino's Pizza International hopes to ride the swell of interest in convenience and Oriental foods to the top of

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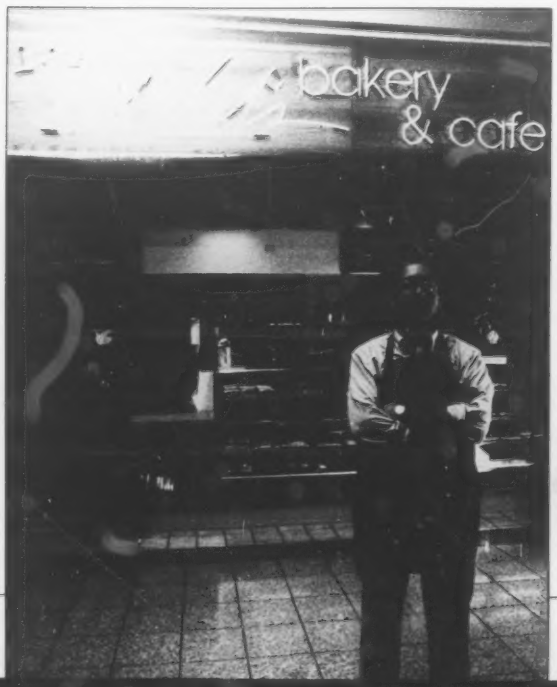

Michel's Bakery & Cafe evolved because customers and mall developers are looking for more than a single-item concept in the food court.

Sales for year ended 12/31/90 unless a different fiscal year (fy) is noted; average unit volume (AUV) is for units open at least one year.

GROWTH CHAINS

New Oriental-theme operations tout fresh and healthful fare, takeout and delivery services.

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the segment.

Last year, Burnham licensed the Ho-Lee-Chow trademark and the recipe book for the concept from Toronto entrepreneur Eric Johnson, who founded it in Canada two years ago. (There are 24 units in Canada.) HLC America has obtained the franchise rights for the United States, Mexico, Israel and the United Kingdom.

In April, Burnham started his franchising push. By year-end, he plans to have five company stores and one franchise open.

To execute his ambitious plan, Burnham has assembled a team of 20 managers—18 formerly of Domino's. And with development agreements signed for Chicago; Indianapolis; Dallas; parts of Virginia; Mexico City; Tel Aviv, Israel; and the United Kingdom, his team seems to be on schedule. Most contracts are five- or 10-store area agreements.

As at Domino's, Ho-Lee-Chow units prepare food to order. Delivery areas are limited to 18,000 households, translating to an eight- to 10-minute drive from the store. "The whole issue is quality control," Burnham says.

Unlike Domino's, Ho-Lee-Chow makes no promise of 30-minute delivery, a deliberate move by Burnham, former general counsel of Domino's, to avoid the lawsuits and bad press that have plagued the pizza chain. Delivery times run about 22 minutes, he says, and he credits the speed to relatively fast preparation time—about two minutes for Chinese vs. about seven minutes for pizza.

Of 15 to 18 units currently in the works, Burnham says two-thirds will be franchised. He says he is committed to opening a mix of company-owned and franchised stores. Ho-Lee-Chow plans to cluster units by areas of dominant influence for marketing efficiency.

The total cost of opening a restaurant runs $170,000 to $230,000, he says. Franchise fees are $25,000 and royalties, 7% of sales. The contract calls for a 4% advertising fee, which HLC is currently waiving to allow franchisees to fund local-store marketing programs.

Ho-Lee-Chow's menu is broad, with about 215 items in total. Prices for individual items range from $1 for an egg roll—one of the top sellers—to $13.45 for Chinese shrimp pizza, one of the menu's late-dinner selections. The menu trumpets the food's lack of monosodium glutamate and other artificial flavor enhancers as well as its environmentally friendly packaging.

In addition, Burnham has outfitted units with the latest support technology, including a one-call-shopping 800-number ordering system for supplies, and new computer system that combines POS, marketing, accounting and inventory control functions.

Former Domino's executive Tom Burnham hopes to open 320 Ho-Lee-Chow takeout and delivery units by 1996.

THAI HIGH CHICKEN

Chopstix, Los Angeles

Sales, $5 million; units, 5; AUV, $1.5 million to $1.8 million; check average, $7.50.

"Fun, Healthy and Quick" is the message Chopstix cafes wants its trendy California clientele to take home with them.

Over the past year, the upscale chain has added two new restaurants, in Encino and in Malibu. It has another three restaurants under development, in Long Beach, in San Diego and at Caesar's Palace in Las Vegas. All of the chain's restaurants are company owned, and it plans to have the three new restaurants open in 1992, says Edward de Limburg, vice president of operations for parent company Chopstix International II.

Backed by three private investors, including President Frank Monteleone Jr., the company purchased the start-up chain almost two years ago. It has spent much of that time retrenching. "It was in pretty poor shape," says de Limburg.

The new owners even closed one restaurant in Redondo Beach. "It was not a good location. Five restaurants had been in there previously, and none of them had made it," he says.

Now Chopstix is back on track for growth, says de Limburg.

One area the new owners haven't tinkered with too much is the concept's upbeat Thai- and Chinese-influenced menu, developed by Hugh Carpenter, the chain's former executive chef. However, they are testing an upgraded dinner menu at their newest restaurant in Malibu, where they felt they needed a more sophisticated offering.

A best seller on the core menu, which comprises about 30 food items, is southern California pot stickers, pan-fried dumplings stuffed with morsels of chicken, water chestnuts and spinach and glazed in orange sauce. A serving of five pot stickers is priced at $4.25. Another popular item is the Chopstix shredded chicken salad, a medley of shredded chicken, lettuce, slivered almonds, crispy won tons and rice sticks tossed in tangy red ginger dressing. A serving runs about $5.50.

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GROWTH CHAINS

Chicken chains are going strong—customers want it grilled, fried and roasted on the spit.

BIG HOPES FROM SMALL UNITS

Small units with limited menus and stripped-down service still look good in foodservice, where franchisees' finances often are as squeezed as customers' time.

Family-owned Krystal, Chattanooga, Tenn., began franchising for the first time last year with its Krystal Kwik double-drive-thru. The burger chain now has 15 licensed and 11 company-owned Kwiks open in five states.

Dayton, Ohio-based Cassano's Pizza & Subs has revamped a hometown unit into a Pizza King Express drive-thru outlet, serving three types of 6-inch pan pizza with a three-minute guarantee.

Fast burger-specialist Central Park USA now has two units in test in its Vita Bella drive-thru Italian concept. Located near the chain's Chattanooga home, the stores sell spaghetti in single servings (99 cents) or family-size buckets ($4.49), along with two kinds of 6-inch pizza (cheese, 79 cents; pepperoni, 99 cents). The company plans two more tests before deciding on Vita Bella's franchising potential.

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Chopstix restaurants average 2,600 to 3,000 square feet and 120 seats. About 40% of business is done during lunch; the remaining 60% at dinner. Between 27% and 33% of sales come from takeout and delivery, offered by all restaurants, says de Limburg.

POULTRY

AN A-PEELING PROPOSITION
Chicken A-Peel, St. Louis
Sales (fy end 6/30), $5 million; units, 12; AUV, $400,000; check average, $4.50.
A secret recipe made the Colonel famous, and it might just work again for 12-unit Chicken A-Peel. Folks love fried chicken, but eating the skin doesn't appeal to today's health-conscious consumer. So Chicken A-Peel founder Al Genovese developed a skinless fried-chicken recipe back in 1986, and is ready to take the concept national.

"By the year 2000, I don't think there will be much skin-on chicken available in the market," says Genovese. The concept's star product is made with a double marination process that adheres special-recipe breading to the chicken through the vegetable-oil frying process. Prices range from $3.39 for a two-piece dinner, including two side orders and biscuits, to $16.99 for a 16-piece dinner with three side orders.

Breading ingredients are all natural and the chicken is fresh, not frozen. The chain's fried chicken has less than half the calories and 20% less fat than traditional fried chicken, Genovese says. Rotisserie and charbroiled varieties also are available.

Franchisees have already signed area development agreements for 16 more units in St. Louis, 28 units in Detroit and 21 units in San Diego.

LET'S TALK TURKEY
Stuff'n Turkey, Owings Mills, Md.
Sales, $9 million; units, 21; AUV, $500,000; check average, $5.75.
Co-founder Alan Morstein believes his turkey concept has a great future, and apparently, others do, too—Little Caesars Chairman and President Michael Ilitch, for example, opened his Stuff'n Turkey franchise in Detroit's Joe Lewis Arena last year.

The menu offers a vast array of salads ($3.99 to $4.59), sandwiches ($2.99 to $4.99) and hot entrees, such as turkey pot pie ($2.99)—all made with fresh-frozen, extra-heavy, turkey breast meat that is slow cooked and carved on the premises. Two contracted purveyors custom-raise the turkey.

Local bakers, hired in each city

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Chicken A-Peel's special breading and marinade let customers have their fried chicken with less fat and fewer calories.

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GROWTH CHAINS

The most promising "healthy menu" chains combine nutritional savvy with a good dessert menu.

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where units are located, provide homemade par-baked breads that are finished off in house. Varieties, which include rye, marbled rye, sunflower seed, whole-wheat, sourdough and oat bran, are sliced to customers' specifications.

The chain, with units in 13 states, plans to have at least 50 by the end of 1992.

WINGING IT ON CAMPUS
Buffalo Wild Wings and Weck (BW3), Cincinnati
Sales, $5.5 million; units, 8; AUV, $750,000; check average, $4.65 to $5.25.
With 10 brands of beer *on tap*, spicy chicken wings ($3.65 for 12), burgers ($1.95 to $3.74), salads, Buffalo Breath chili ($1.85), sides and sandwiches on the signature weck (kaiser roll with rock salt and caraway seeds baked in on top, $2.29 to $4.24), BW3 is a college student's dream. Most of the units are located on or near campuses, including Indiana University, Ohio State and the University of Cincinnati. Now, after nine years in business, the chain is ready to franchise—with college communities as the target market.

With no advertising aside from table tents set out in the last three months, BW3 already has had 150 franchise inquiries and expects to have at least five to eight new units by the end of 1992. The fee is $19,500 for a full-service concept. "We want to take it slowly this first year," says Jim Disbrow, president. "We are in the very competitive middle market, somewhere between McDonald's and Bennigan's, but we know our customers and they love the concept."

'HEALTHY MENU'

THE SUN SHINES ON HARVEST
Harvest Restaurant & Bakery, Englewood, Colo.
Sales, $5.7 million; units, 7; AUV, NA; check average, $6.25.
Eleven-year-old Harvest aims its healthful-food menu at sophisticated baby-boomers who want distinctive taste while they watch their nutrition. Having opened three sit-down units and three express counters in its home state, Randy Pike, Harvest's president and a former Mr. Steak chairman, plans a strong drive into markets west, especially (where else?) California.

Harvest's half-meatless menu is a hit in its native Colorado; now it's on to California for the chain that serves health with style.

Harvest's menu consists of 53 entrees, side dishes, desserts and breakfast items prepared with an eye to both nutrition and flavor. About half the entrees are meatless dishes, for example, cheese and mushroom manicotti, broccoli walnut casserole in herbal cream sauce, and Tokyo Tofu spaghetti, made with wok-fried vegetables, tofu and eggless pasta. The other entrees use chicken, turkey or lean beef.

Harvest offers a 37-item breakfast menu with sourdough seven-grain pancakes and a make-your-own omelet. And the on-premises bakery turns out apple cinnamon rolls, unbleached flour croissants and apple crumb cake for eat-in or takeout.

COFFEECAKE AND COMMITMENT
Hobee's Restaurants, Palo Alto, Calif.
Sales, $10 million; units 11; AUV, $800,000; check average, NA.
Hobee's asks a lot of a potential franchisee: namely, a philosophical commitment to the ideals of healthful eating, employee empowerment and, above all, customer service. But seven operators have been willing to make that commitment so far. And Peter Taber and Connie Durant, offspring of Hobee's founder Paul Taber, are confident the chain's recent double-digit profit hikes will keep enough franchise offers coming in to open four to six new Hobee's a year.

Healthful though it might be, Hobee's menu is a study in contradictions. The menu is about half vegetarian, and sales are slightly more so, about 60%. On the veggie side are a seven-vegetable quesadilla ($6.25), black-bean chili over brown-rice pilaf ($6.50), and an all-you-can eat salad bar ($6.25). But carnivores can choose from three chicken entrees and five burgers—though the one made with a tofu patty outsells these.

But one of the most popular of Hobee's offerings, at breakfast and through the day, is the menu of seven dishes made with the chain's signature hash-brown potatoes, from Hi-Hat hash browns topped with ham and cheese, to Saratoga-style with turkey sausage, mushrooms, tomatoes, peppers, tomato-basil sauce and cheese.

Hobee's franchisees pay $35,000 for the first unit and a 5% royalty on sales.

HEART-Y EATING
Bless Your Heart, Midland, Texas

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GROWTH CHAINS

Diverse concepts trade on good value, a simple focus and entertainment.

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Sales, $3.5 million; units, 8; AUV, $500,000; check average, $5.50.

Bless Your Heart founders Steve and Amanda Plummer went down to Acapulco for a vacation in 1985 and came back with a restaurant concept: one featuring all-natural soups, salads and sandwiches carefully monitored for their dietary value. They opened their first restaurant in 1987 on a site where four previous operations had failed. Four years later, eight Bless Your Heart outlets scattered through Texas and Louisiana serve up a 33-item menu.

Almost every Bless Your Heart item meets the American Heart Association's guidelines. All but three items get less than 30% of their calories from fat; and even those three can be adapted. For the ultimate in nutritional control, the chain makes its own bread, sour cream, nonfat yogurt and salad dressings. It substitutes mozzarella for higher-fat Cheddar cheese in salads and has devised a low-fat "mock guacamole" for Mexican and avocado dishes.

Sandwiches, priced at around $4, center on turkey, tuna, grilled chicken and lean roast beef. The same elements turn up on the salad menu, while soups are made from scratch daily with lean meats. A children's menu offers a turkey melt, grilled mozzarella sandwich or PB and J made with fruit-juice-sweetened preserves. For the dessert-minded, Bless Your Heart offers yogurt shakes in 10 flavors and six kinds of fruit slush drink.

MISCELLANEOUS

LUCY LOVERS, THE NEW GENERATION
Juicy Lucy's, Fort Myers, Fla.
Sales, $3.4 million; units, 5; AUV, $875,000; check average, $3.

Juicy Lucy's? It means juicy, loosely shaped hamburgers. And once customers taste the hand-pattied, fresh-ground-beef product, the name makes sense, according to Suzanne Grady, partner in the three-year-old double-drive-thru venture.

The top seller is the 99-cent quarter-pound grilled hamburger. Breaded chicken breast, breaded pork loin, barbecue pork, BLT, and ham and cheese sandwiches complement the line of burgers. A breakfast menu consists of fresh egg sandwiches made to order.

Within 18 months, 15 to 20 more units will dot southwest Florida and the state's coastal cities that have a minimum population of 20,000. Grady says the chain has national expansion plans, and expects to have as many as 500 units in five years.

The startup cost for a franchise is between $300,000 and $350,000. The initial franchise fee is $25,000, the royalty is 5% and advertising contributions stand at 0.5%.

NO PLACE LIKE HOMESTYLE
Homestyle Buffet, Oldsmar, Fla.
Sales, $52.5 million; units, 32; AUV, $1.7 million; check average, $5.70.

With 90 items on the menu, Homestyle Buffet is banking on its ability to give middle-America families the variety they desire at a price they can afford.

With a food cost that runs at 36%, the buffet presents traditional salads, fruit, soup, hot rolls and muffins baked on premises, vegetables and a variety of entrees including carved roast beef, turkey and ham. Dessert fare includes key lime pie, cheesecake and cobbler. Lunch costs $4.99; dinner, $6.99.

Guest counts stand at 6,000 per week. Homestyle's average unit volume is $1.7 million. At larger units, that translates into profit of more than 15%, according to John Scott, president, who came to Homestyle Buffet in June after engineering the turnaround at PoFolks.

By the end of 1991, 36 units will be in operation. Scott says the chain plans to add 20% to 25% new company units each year in Florida and up the Atlantic coast. A franchising program, expected to start within a year, should boost the unit count to as many as 80 by the end of 1993.

JILLIAN'S RACKS UP SALES
Jillian's Billiard Club & Cafe, Boston
Sales (fy end 3/31), $3 million; units, 4; AUV, $1.3 million; check average, $15.

"I'll have the marinated chicken brochettes, grilled prawns, champagne, and, by the way, rack 'em up." This is a familiar refrain at Jillian's, a four-unit upscale billiards club that takes foodservice seriously.

Chief Operating Officer Steve Foster plans to open five more units within 8 months and wants to add one a month for the following 12-month period. To date, all units are joint ventures.

Finger foods dominate the menu, making it easy for guests to play pool and eat at the same time. A line of salads, sandwiches, grilled skewers, 9-inch pizzas (shaped like triangular pool racks) and desserts range in price from $2 to $10. On average, foodservice accounts for 55% of total sales. **RST**

With a strategy to remain price-oriented, nothing on Juicy Lucy's menu sells for more than $2.

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